
PHANTOM CAPACITY

Texas couldn't tell real demand from noise.

Why reservation systems become unreliable planning signals.

THE EVIDENCE

474 GW

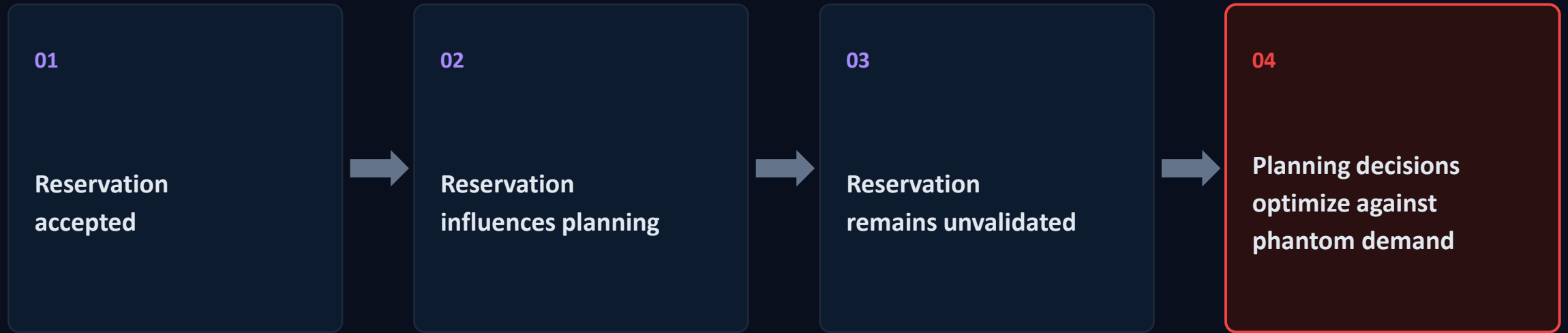
WAS IN THE QUEUE

TEXAS ALL-TIME PEAK DEMAND

91.1 GW

The problem wasn't that all 474 GW was fake. The problem was that the planning system couldn't reliably distinguish committed demand from speculative requests.

HOW PHANTOM CAPACITY FORMS



The system isn't necessarily wrong. It's optimizing against the wrong signal.

PHANTOM CAPACITY

Capacity that appears committed inside a planning system but lacks sufficient evidence that it will ever be consumed.

Grid interconnection
request

GPU allocation

Cloud commitment

Storage forecast

Different objects. Same planning failure.

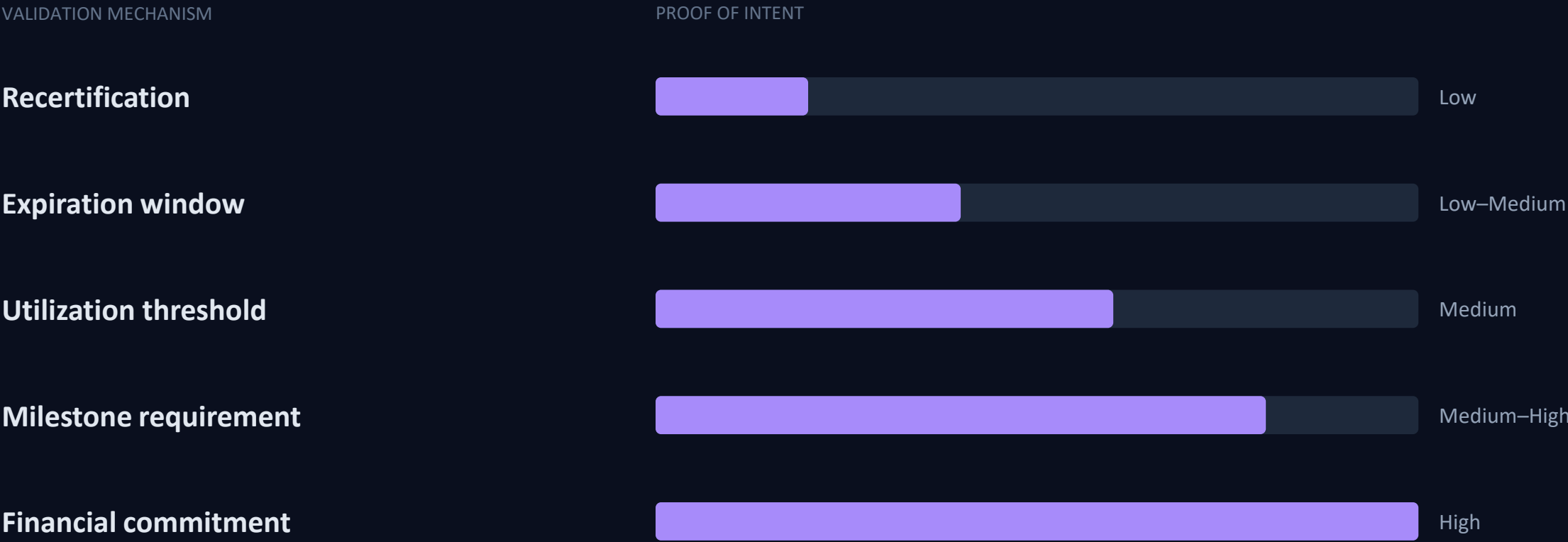
IS IT PHANTOM CAPACITY?

- 1 What signal is being accepted?
- 2 What validation is missing?
- 3 Who absorbs the cost when it's wrong?
- 4 What happens when phantom capacity accumulates?

If the reservation materially influences planning before credible intent is established, you have Phantom Capacity.

THE CONTROL

MAKE THE SIGNAL EARN ITS WEIGHT



The higher the cost of a false positive, the stronger the validation must be.

ARCHITECT'S VERDICT

DON'T COUNT RESERVATIONS. COUNT VERIFIED DEMAND.

A reservation, allocation, quota, commitment, or forecast should not influence capacity or procurement decisions simply because it exists. It has to earn the right to influence the plan.
the plan.

Framework #171 — Phantom Capacity

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